Annie App for Clinicians
Quick Start Guide

Overview

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The Department of Veterans Affairs' (VA) Annie mobile application (app) is a Short Message Service (SMS) text messaging capability that promotes self-care for Veterans enrolled in VA health care. Patients using Annie receive automated prompts to track and monitor their own health and motivational/ educational messages. Annie also sends VA appointment reminders and messages from the patient's local VA medical center.

NOTE: Annie is for patient self-care and not for direct texting between Veterans and staff.

The Annie App for Clinicians allows clinicians to use and create care protocols that allow patients to easily to submit their health readings back to Annie. Messages and patients' data is stored in the Annie system where clinicians can view the texts and readings as needed.

Annie is named after Lieutenant Annie G. Fox, the first woman to receive the Purple Heart for combat. She was Chief Nurse in the Army Nurse Corps at Hickman Field, Pearl Harbor.

General Info

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Prerequisites

To use the Annie App for Clinicians, you must have Veterans Health Information Systems and Technology Architecture (VistA) credentials.

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Admin View, Staff View, Broadcast Admin and System Admin

The Annie App for Clinicians offers:

- Staff View – Find and register a patient, view and assign a protocol, edit active protocols, review messages to and from a patient, see charts and tables of patient data.

- Admin View – Create and edit protocols assigned to patients in Staff View.

- Broadcast Admin – Send messages on behalf of your VA medical facility to all Veterans who are registered in Annie and opt in to receive messages from your VA medical facility.

- System Admin (only available to a limited number of users) - Manage permissions for staff users, edit the response messages for Annie's text commands (Help, Pause, Resume, Start, Stop), set default values for measurements and create new measurement readings.

The Staff View is available to all users. You may also have Admin View, Broadcast Admin and/or System Admin privileges.

NOTE: Not everyone will have access to Admin View, Broadcast Admin and/or System Admin. While each clinician with appropriate scope of practice privileges will be able to assign and edit protocols for their patients, only some staff members will be able to create protocols and even fewer to send messages on behalf of the VA facility and/or manage permissions and set defaults.

If you are able to access Admin View, Broadcast Admin and/or System Admin, you can switch among them by tapping the greeting that says, "Welcome, [Your First Name]." A drop-down menu will appear, and tap one of the potential opposing views: **Switch To Admin View, Switch To Staff View, Broadcast Admin** or **System Admin**.

Staff View

Find and register a patient, view and assign a protocol, edit protocols, review messages to and from a patient, see charts and tables of patient data.

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Navigate the Staff View Screen

In Staff View, there are five tabs that allow you to navigate:

- Patient Search – Search for a patient by last name, full social security number (SSN) or first letter of last name combined with last four digits of SSN.

- Patient Summary - See information on the patients you prescribed protocols to.

- Protocols – View and edit active protocols, audit changes made to inactive or active protocols, enable or disable protocols, assign protocols and adjust patient account settings.

- Message History – See the conversation history between your patient and Annie.

- Reports – See charts and tables of patients' health tracking data sent to Annie.

Tap on a tab to go to the corresponding screen.

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Search for a Patient

There are two ways to search for a patient: use the Patient Search bar at the top of the screen, or the Patient Search tab. Enter patient last name, full social security number in the format of XXX-XX-XXXX or first initial of last name and last four digits of social security number in search bar. Tap **Go**, and a list of patients who match your search will appear. Tap the patient you would like to view, and you will go to the patient's Protocols screen. The patient's name and additional identifying information will always display at the top of screen in Staff View as you switch among the five tabs.

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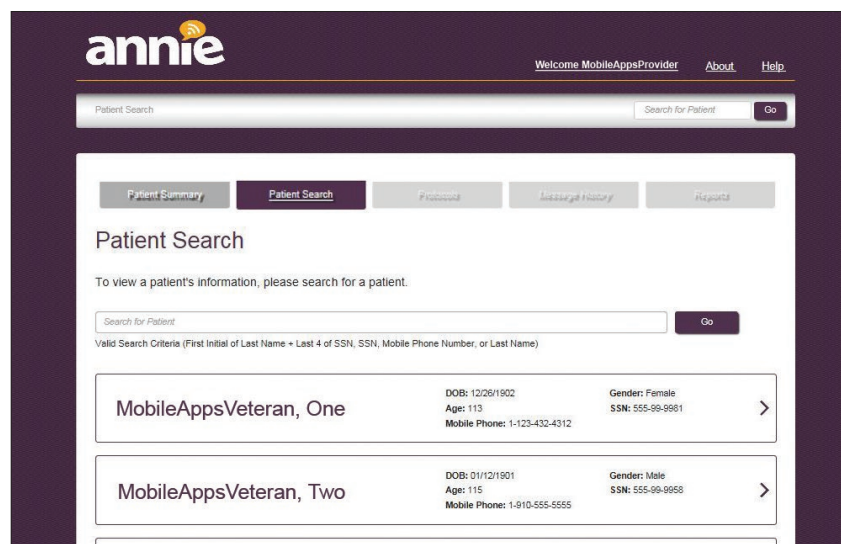
Understanding Protocols

Protocols use templates that send to and collect information from your patient. Protocols can be accessed by any Annie App for Clinician's user, so you can use protocols other users have created. There are five types of protocol templates:

- Vitals – The Vitals template is to request and receive readings from patients, such as blood pressure. You will have the option for designating the lowest and highest valid readings for patients, as well as low level, critical low level, high level and critical high level readings that fall within the thresholds you set but are still of concern in the Reading/Alerts section of the Vitals template. Patients will receive alerts if their readings fall into these categories, if their readings are rising or falling rapidly or the repeat alert type and occurrence is reached, so be sure to create thresholds that are clinically relevant and that the alert messages you create tell patients what to do if their readings are too low or too high. **NOTE:** Additional messages to the patient may be triggered depending on the patient response.

- Motivational/Educational – The Motivational/Educational template is to send messages to patients that do not request a response, but help motivate or educate patients. **NOTE:** Pre-drafted Motivational/Educational messages are not built into Annie; you will need to write messages or edit a protocol that has already created motivational/educational messages.

- Categorical – The Categorical template is to request and receive measurements and information from patients that may be more qualitative than vital readings, such as mood over time. You can designate accepted responses, and whichever response a Veteran chooses will trigger a specific response from Annie (e.g., acknowledging that a Veteran is "happy" or "sad"). **NOTE:** Additional messages to the patient may be triggered depending on the patient response.

- Yes/No – The Yes/No template is to request and receive a response to yes/no questions, such as "did you exercise today?" **NOTE:** Additional messages to the patient may be triggered depending on the patient response.

- Scaled Response – The Scaled Response template is to request and receive a numeric response to a question, such as asking the patient to rank their pain on a scale of one to ten. You can designate a value for the lowest and highest valid reading, and patients will receive an alert if their readings fall outside that threshold. **NOTE:** Additional messages to the patient may be triggered depending on the patient response.

NOTE: Different protocol templates can be linked together so that a specific response to a message triggers a chained template to send a message to the patient (e.g., a critically low caloric intake response can trigger a chained blood glucose template to send a message to the Veteran).

Chaining can be done between:

- Vital Templates
- Categorical Templates
- Yes/No Templates
- Scaled Response Templates

IMPORTANT: Messages sent to patients should NEVER reference Section 7332 information, which includes information pertaining to drug abuse, alcoholism or alcohol abuse, infection with the human immunodeficiency virus (HIV) or sickle cell anemia. VA's approval to use the system is conditional on the exclusion of this information.

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Write an Ideal Message

Each protocol has a message area, which you can draft in the Admin View and customize in the Staff View, and will be the exact message the patient receives. **REMEMBER:** Messages are designed to motivate and help patients improve their self-care, so write all messages in ways that are inspiring and friendly.

If you request a reading that requires the patient to respond, please include the format and key word they should use in their response within the Service and Reminder Messages, which are explained below. When a patient responds to a request from Annie to send in a reading (e.g., blood pressure measurement), the response MUST START with a keyword or abbreviation so that Annie understands the message. Annie uses these keywords to know what kind of information the patient is sending. The letters can be upper or lower case. Spelling has to be EXACT. Depending on the information the patient is sending, the message must begin with one of the following keywords or abbreviations (see terms in bold):

When Annie requests this information	The patient must start the message response with
Blood Pressure	**BP** or **BLOOD**
Pulse Oximetry (SpO2) or Oxygen level	**OX** or **OXYGEN**
Blood Glucose or Sugar	**BG** or **GLUCOSE** or **SUGAR**
Glucose Before Eating	**BGB** or **BEFORE**
Glucose After Eating	**BGA** or **AFTER**
Weight Loss	**WE** or **WEIGHT**
Caloric Intake	**CAL** or **CALORIES**
Amount of Exercise	**EXE** or **EXERCISE**
Temperature	**TEMP**
Pulse	**PULSE**

For example, if the request is to send in a temperature reading, then write the Service and Reminder messages to include the appropriate keyword or abbreviation. "Please send me your temperature in the following format: TEMP 98." If the patient responds without the using the correct format, Annie will not understand the message.

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Enable or Disable a Protocol

Once inside the Patient Record in Staff View, tap the On/Off circle next to Status. A pop-up box will appear asking if you are certain you want to enable or disable the protocol. Type in the reason for the change, and tap **OK**. **NOTE:** Once a protocol is disabled in Admin View, it cannot be assigned in Staff View.

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Assign Protocols

You can assign protocols to patients who are registered with Annie and who have not paused or stopped protocol messaging. First search for and select the patient to whom you would like to assign a protocol. Tap **Assign New Protocol**, and you will go to a list of protocols that have already been created. Tap **Assign New Protocol** for the protocol you would like to set up for your patient, and follow the prompts to customize the protocol as desired.

NOTE: Before you assign a protocol, make sure the health readings information (e.g., blood pressure) requested is not already requested by another protocol.

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Edit or View a Protocol

Once inside the Patient Record in Staff View, if a protocol is active or a draft, you will be able to edit or view its details. Tap **Edit/View** under the active protocol you would like to edit or view. You will go to the protocol's screen, which shows its name, description, and template(s) you set up. Tap the template associated with the protocol that you would like to edit. A drop-down list of the protocol's settings will appear, which will depend on what type of protocol you are editing. Tap the settings heading you would like to edit. Adjust the areas like you would when setting up the protocol. Tap **Save**, or to exit without saving, tap **Cancel**.

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Register a Patient

To register a patient, you must be in Staff View and have searched for and selected the patient you would like to register. Tap **Account Settings** under the patient name at the top of the screen, and you will go to an Account Screen. On the Account screen, tap the **Consent to Participate** tab, and tap **Annie Information and Disclosure Factsheet**. A pop-up box with background information about Annie, patient responsibilities and risks will appear. Read over the information, and provide an overview to your patient to make sure he/she understands and consents to the Annie messaging service. Tap **Dismiss** to close the box. Tap the checkbox next to "Patient-Provider Informed Consent Discussion Occurred" to confirm the patient understands and agrees to participate in Annie.

NOTE: You may notice that some of the information in these sections is already filled out if the patient has self-registered to use Annie. However, you will still need to discuss Consent with your patients in order for them to use the Protocols features of Annie, otherwise they are limited to only receiving appointment reminders and VA medical facility broadcast messages.

IMPORTANT: While the checkbox is only selected once, the patient's informed consent to use Annie should be obtained each time a new protocol is assigned to the patient and the consent/assignment noted in CPRS.

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View Message History

First search for and select a patient whose message history you would like to view, and then tap the **Message History** tab. You will see the details of the messages exchanged between Annie and your patient, including the name of the protocol, the date and time the messages were sent, the contents of the message, whether the message was sent by Annie or the patient and any alerts that were triggered by the patient's responses.

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View Patient Reports

Based on the readings a patient has sent to Annie, the Annie App for Clinicians will be able to display a report. The report consists of a chart and a table of a patient's readings information. First search for and select a patient whose reports you would like to view. Then tap the Reports tab. Under Filters, tap the measurements under the Readings heading you would like to view. Tap either **1w** (one week), **1m** (one month), **3m** (three months), **6m** (six months), **1y** (one year) or **All** to adjust the data covered in the report. **NOTE:** If your patient has not submitted adequate data, some buttons will not be available. A summary of the selected readings will be on the right including the lowest reading, the highest reading, the average and current readings and the number of days data was sent over the time period selected.

To see the data in graphical or table format, tap **Combined Report** (to view all measurements selected) or **Reports** next to a specific measurement. You will go to a graph of the selected data. Tap **Table** to view the data as a table and **Chart** to return to the graph from the table.
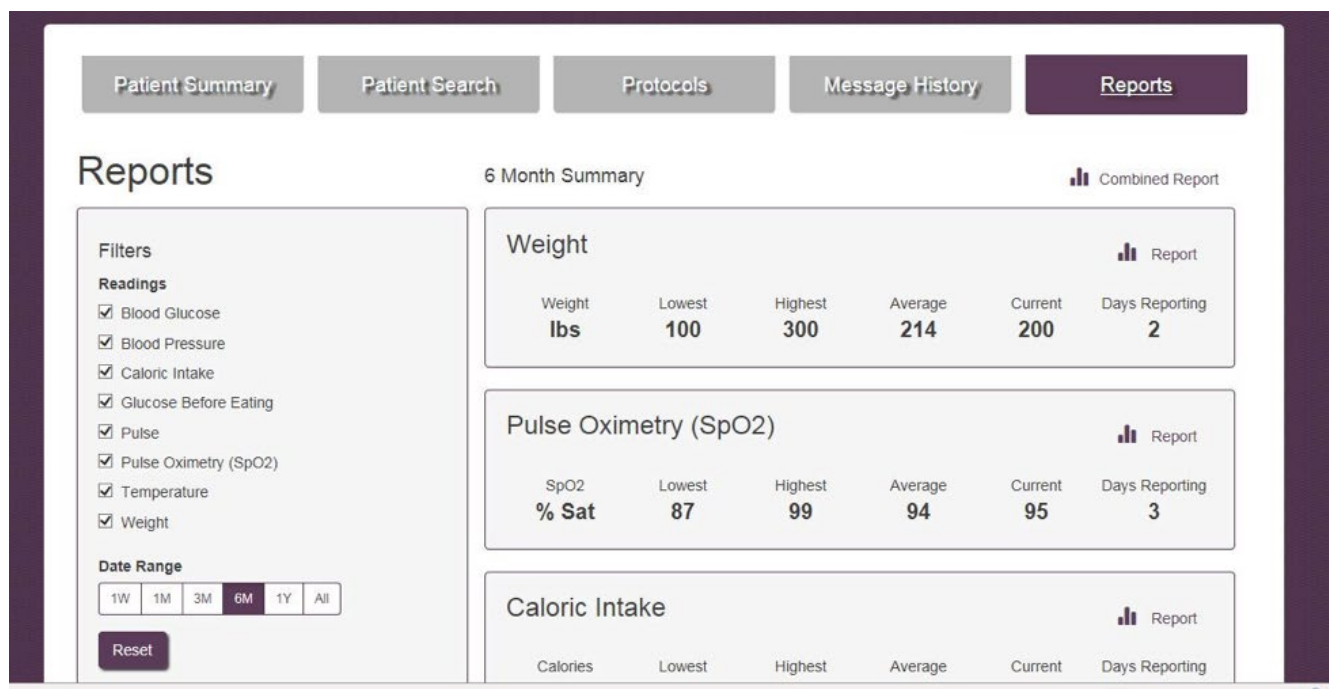

Adjust Patient Reports

You can change the information shown through the filter. To access the filter, tap **Filter** then use the following options to adjust the data shown:

- Readings – Tap the checkbox(es) next to the measurements you would like to view.
- Date Range – Tap **1w**, **1m**, **3m**, **6m**, **1y**, **All** or **Custom**, and enter the From and To dates for which you wish to view the data.
- Navigator – Use the Navigator to adjust the readings shown in the Graph and Table. The Date/Time Line will change accordingly, as will the Date Range. If you tap an oval on the Navigator, you can shorten or lengthen the Date Range. If you move the horizontal scroll bar, you can slide to see the dates and data that fall within the set Date Range. For example, if you set the vertical bars so that the window of time is for two months, you can then use the scroll bar to move the two-month time frame from April-June to September-November.

KEY TAKEAWAYS: The entirety of data available for a reading is always shown in the Navigator. The graph data shown in the chart depends on how you use the Date Range and Navigator. Any one of these can be used to limit or expand the data shown. As an example, by dragging the leftmost oval on the Navigator to the right, less data is shown in the chart. If there is a lot of data displayed (e.g., cluster of points), you can use the navigator to zoom in and out to view the trend more clearly. The Date/Time Line is the horizontal line, or axis, for the chart and changes as the data being viewed is changed. The Date/Time Line is the horizontal reference for the data shown in the Graph section of the Chart.

Admin View

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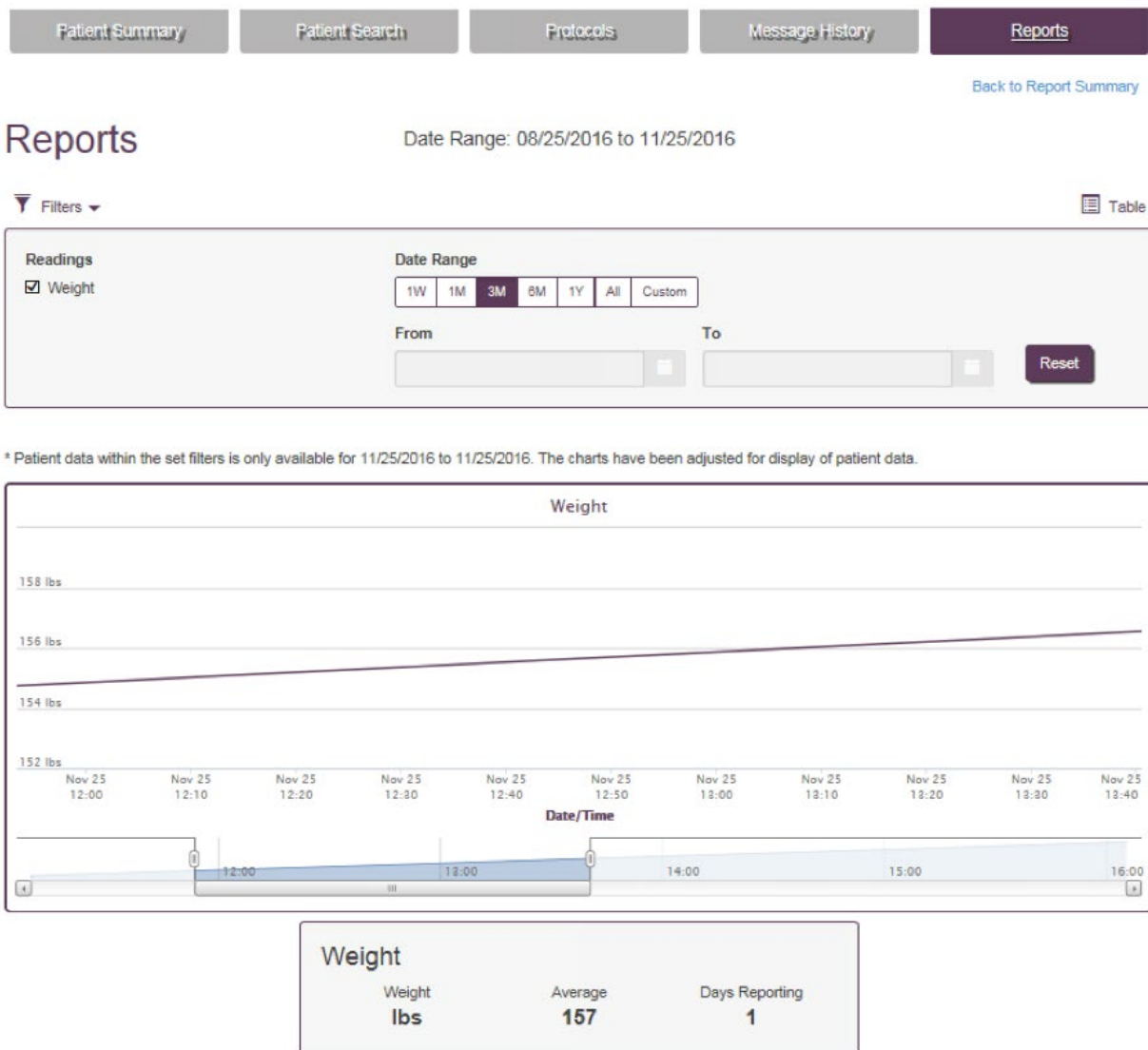
Create and edit protocols that can be assigned to patients in Staff View.

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Add a Protocol

To create a protocol, make sure you are in the Admin View, and then tap **Add Protocol** to go to a Protocols screen. Type in the Protocol Name, Description and Focus Area (The Focus Area is like a tag that will help you categorize the protocol (e.g., blood pressure)). Add a Template, and tap the template you would like to use (Vitals, Motivational/Educational, Categorical, Yes/No or Scaled Response)..

After selecting the type of protocol, you will need to complete the template settings for the protocol, and the format will depend on the type of protocol you selected. Tap the headings of the settings you may need to complete, which will expand the template details below. Set the details of the setting, usually by tapping to fill in a circle or to select an option from a drop-down menu. Tap **Save**, and a pop-up box will appear confirming that your changes have been saved. Tap **OK**, and you will be taken back to the Protocols screen.

IMPORTANT:

(1) If you are adding a Vitals template, you have the option in the Schedule Settings to tap the circle next to Yes or No pertaining to whether you would like to receive any unscheduled readings from your patient. Please always ensure that Yes is selected so that Annie will respond appropriately to all messages sent by patients.

(2) Please ensure that the threshold levels and messages for your Vital template are appropriate to your patient population and your VA medical facility's clinical procedures for providing care.

(3) Creating a reminder message is not required, but is strongly recommended to help ensure your patient submits readings and receives the appropriate responses from Annie.

(4) Visit the Staff View section of the Quick Start Guide to learn more about protocols.

Broadcast Admin

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Send messages on behalf of your VA medical facility to all Veterans who are registered in Annie and opt in to receive messages from your VA medical facility.

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Add a Broadcast Message

To create a new broadcast message, tap **Add Message**. Type in the title up to 40 characters (the title will not be sent as part of the message). Type your message up to 160 characters, and specify how often your messages should be sent. Tap **Save**, and then tap **OK**.

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Sort your Broadcast Messages

After you have created messages, you can easily find them by using the filters on the Broadcast Admin main screen. As you change the filters, the messages below will adjust accordingly. To go back to viewing all of your messages, tap **Reset**.

System Admin

System Admin (only available to a limited number of users) allows you to manage permissions for staff users, edit the response messages for Annie's text commands (Help, Pause, Resume, Start, Stop), set default values for measurements and create new measurement readings.

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Manage Staff

Tap **Manage Staff**, and tap the radio button next to where you would like to search for staff, within Annie or Other VA Databases. Enter the last name of the staff member you wish to find. Tap **Search** and a list of staff members who match your search will appear. Tap on the staff member you would like to view. Under permissions, check the box next to Give Access or uncheck the box to remove access to Broadcast Admin or Clinical Administration (Admin View). Tap **Save** to confirm you would like to cancel), and a pop-up Success box appears that confirms the changes. Tap **OK** to return to the Manage Staff screen.

Manage Staff	Text Commands	Measurement Settings

Manage Permissions for Staff Users

← Back to Search Results

Manage Permissions for:

MobileApp_Provider, One
IEN ID: #666-66-1234

Facility: CHEYENNE VAMC (dfn-442)

Select Permissions:
☑ Broadcast Administration
☑ Clinical Administration

Save   Cancel

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Measurement Settings

Tap **Measurement Settings**, and tap **Settings** of the measurement you would like to set default values for. Type in the Lowest Valid Reading, Highest Valid Reading, Critical Low Level Alert, Critical High Level Alert, Low Level Alert and High Level Alert, and tap Save. A pop-up Success box appears that confirms the changes, and tap **OK**.

Help and Additional Information

Additional training materials for the Annie App for Clinicians

More resources, such as a User Manual, Slideshow and FAQs, can be found on *mobile.va.gov/appstore*, and search for the app to access the resources. To go to the site from the app, tap the **Help** tab at the top of the screen, and tap the **Training Materials** hyperlink.

Help Desk Information

If you need technical assistance with the Annie App for Clinicians, dial **1-844-482-6624** to speak with a VA representative. The Help Desk is open weekdays from 7 a.m. to 7 p.m. CT. For TTY assistance, dial 711.

Emergencies

If you feel that you or your patient's information may have been compromised, contact your local VA medical facility to obtain the contact information for your Privacy Officer. To locate your local VA medical facility, visit VA's Facility Locator: at *http://www.va.gov/directory/guide/home.asp?isflash=1*. **NOTE:** You should never use this app in an emergency situation.